CCC Process for CSMs - License reductions, Cancellations, Billing inquiries

11/21/2025 1:44 pm EST

License Reductions

- Acknowledge receipt of request with customer
- Verify account page to check if there is flag stating authorized contacts
    - If not, proceed. If so, ensure contact requesting change is listed
- Check what MSA the account is under
    - Check for Closed / Won Opportunities since 6/3/2024
        - If after 6/3/2024 we require 90 days written notice
            - Only exception is if there are custom contract terms
- Contract verification
    - Bold Group Projects - Documents - Contracts - All Documents
    - Check customer folder spreadsheet for current contract / license details
    - Reference most recently dated contract in folder for current terms
- Contact customer to review request
    - If case does not have customer request in writing, ask them to submit request formally in writing
    - Inform of current contract terms
    - Document conversation
- Reassign case owner to SalesOps and enable email notification

Cancellations

- Acknowledge receipt of request with customer
- Verify account page to check if there is flag stating authorized contacts
    - If not, proceed. If so, ensure contact requesting change is listed
- Check what MSA the account is under
    - Check for Closed / Won Opportunities since 6/3/2024
        - If after 6/3/2024 we require 90 days written notice
            - Only exception is if there are custom contract terms
- Contract verification
    - Bold Group Projects - Documents - Contracts - All Documents
    - Check customer folder spreadsheet for current contract / license details
    - Reference most recently dated contract in folder for current terms
- Contact customer to review request
    - Determine reasoning behind request to gain understanding if this is an account that can be saved
    - If case does not have customer request in writing, ask them to submit request formally in writing
    - Inform Sales contact of the customer request
    - Inform of current contract terms
    - Document conversation

- Reassign case owner to SalesOps and enable email notification
- SalesOps will determine what is needed for legal and generate S&R
- When S&R is generated, send to customer through Docusign

Billing Inquiries

- Acknowledge receipt of request with customer
- Reference KB for appropriate Genpac contact information
- Tag Genpac resource in case requesting appropriate information
    - If no response after 24 hours, tag again for status update
    - If no response after 48 hours, tag EC Billing & AR Manager for escalation
    - Rinse and repeat after 24 hours
- Ensure customer was contacted (if appropriate) or provide customer with requested information that has been received from billing team
- Close case